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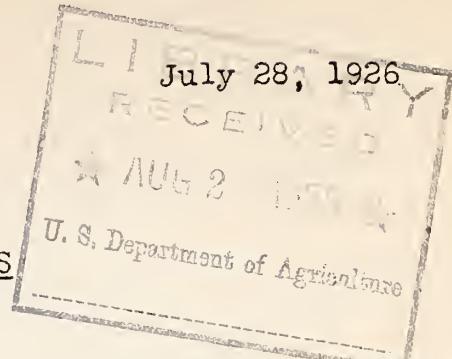


UNITED STATES DEPARTMENT OF AGRICULTURE  
Bureau of Agriculture Economics  
Washington

F.S.  
H-7

FOREIGN NEWS ON HOPS

- - -  
THE 1926 HOP PROSPECTS



The outlook for the American hop crop so far is favorable, while the demand for the output as far as can be determined by indications this early in the season appears likely to be at least as good as last year. The acreage under hops in the United States this year is estimated at 20,800 acres compared with 20,400 in 1925 and 20,350 in 1924. The condition of the crop on July 1, 90.2 per cent of normal, was slightly above the average July 1 condition for the past 10 years although it was below the condition at that time in 1925. It is still too early, however, for any forecast as to the probable size of the crop. The hop acreage in Canada is unofficially reported to be about the same as last year, with no indications as to crop conditions. Canadian and Belgian hops are the leading competitors of the American product in British markets.

It is impossible at so early a date to form an opinion of the demand for the United States crop in Great Britain, the most important consumer of our exportable surplus, but present indications appear to be as favorable as they were last autumn for the 1925 crop. The English hop growers, according to a trade report, have grubbed up 2,175 acres of their vines, or a little over 8 per cent of their total acreage. This reduction was made, however, as a result of the heavy stocks still on hand of the 1924 and 1925 crops. The growing crop is reported to be in a backward condition and some blight damage is mentioned.

Imports of hops into the United Kingdom were 45 per cent smaller last season than in the previous two years. Large stocks and the new tariff on hops, which went into effect at the end of the Hop Control in August 1925, are the principal factors contributing to this decline. Total imports into the United Kingdom from September through June this year amounted to 4,564,000 pounds as compared with 8,442,000 pounds in 1924-25 and 8,301,000 pounds in 1923-24. Imports from the United States were 3,937,000 pounds from September through June this year as against 7,063,000 last year.

Exports of British hops so far this season have been higher than in the same period of 1924-25 amounting to 4,116,000 pounds from September through June this year and 3,924,000 pounds last year, which should help a little to reduce the large stocks in the country. The bulk of the exports go to the Irish Free State. There is no clear indication of the consumption of hops in Great Britain this year, but trade agencies are of the opinion that it has at least kept up to last year. The probable stock of old hops, both domestic and foreign, which will be on hand in Great Britain October 1, 1926 is expected by Barth and Son, Bavarian hop merchants, to be about 37,800,000 pounds compared with 39,100,000 last year.



The vines in Northern Europe were backward in June, according to the International Institute of Agriculture, while in Czechoslovakia and Hungary they were promising in condition. It is too early, however, to form any opinion as to the size of the new crop. Stocks of hops on the continent are stated to be low according to trade reports. A Consular report bears out this statement as far as it refers to Czechoslovakia. The supply in France, is reported to be barely adequate for requirements.

Early prospects for lager beer hops are favorable in Czechoslovakia and Germany. Acreage in both countries were increased in 1925 which should be bearing well by this year. In Czechoslovakia the total acreage in 1925 was 25,249 acres compared with 26,700 in 1924. In Germany the area in 1925 was 30,821 acres compared with 28,738 in 1924. In Germany a further increase in acreage of 20 to 30 per cent is unofficially reported for 1926 following the high prices in 1925. This increase will have little effect on the 1926 harvest but should increase the 1927 crop. The consumption of hops in Germany for 1926-27, according to Barth and Son, is anticipated to be materially heavier than during the present season. The same firm expects the total consumption of hops on the continent in 1926-27 to be somewhat above 1925-26.

There is no indication of the condition of the growing crop in Belgium. Stocks of old hops in Belgium were practically exhausted by the end of March, according to a consular report. There were no offers of Aloft hops but Poperinghe hops were still on sale.

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U. S. Department of Agriculture

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August 31, 1926

FOREIGN NEWS ON HOPS

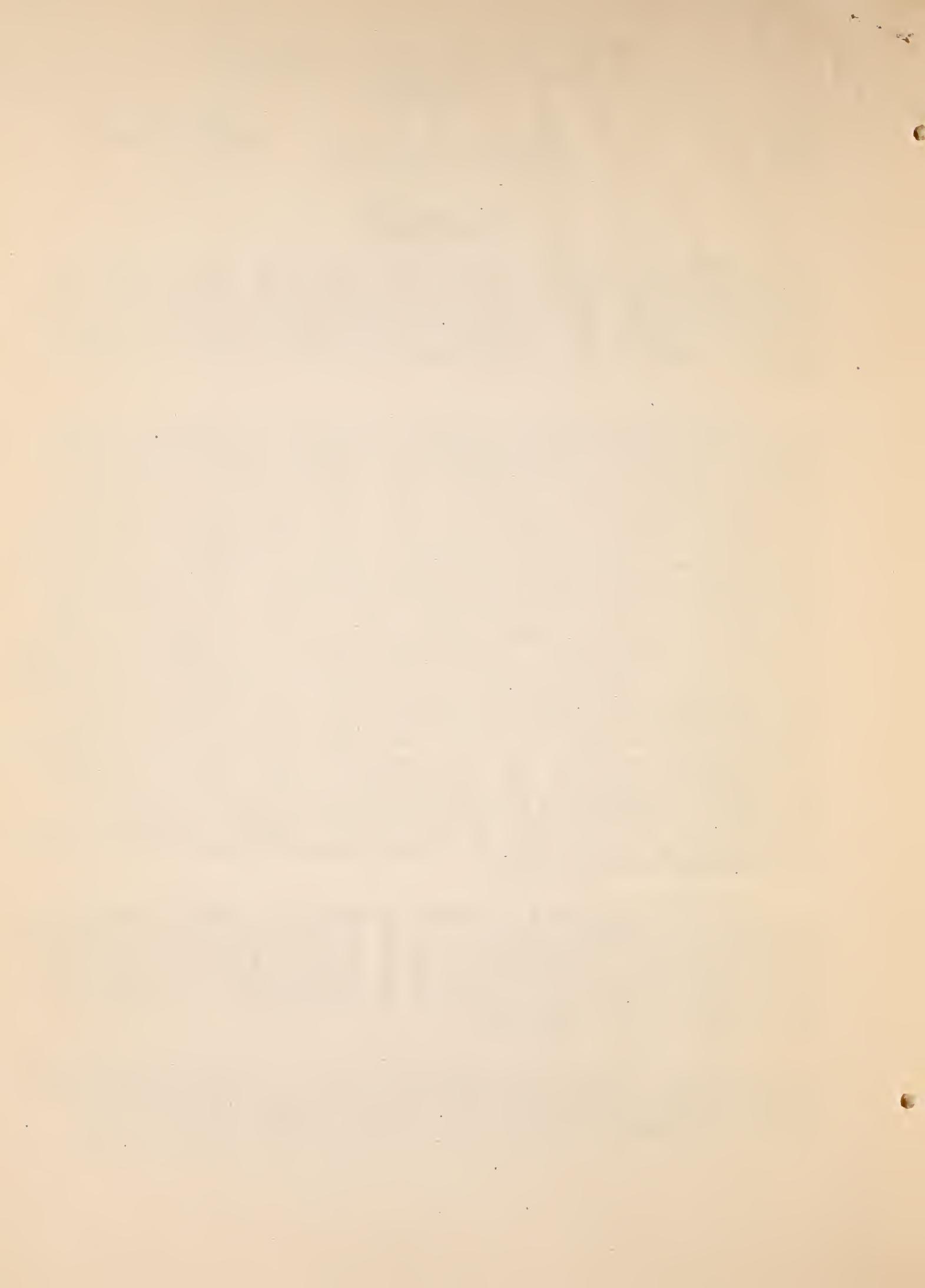
HOP PROSPECTS

While the condition of the United States hop crop deteriorated slightly in July, the foreign demand as indicated by crop prospects in foreign consuming countries, had been weakening up to about the first of August. The condition of the United States crop was 100.9 per cent of normal on August 1 compared with 101.2 on July 1 and 106.8 on August 1, 1925.

In England, our chief customer, the growing crop is reported to have improved materially during July. According to a report on field crops put out by the "London Times" the condition in Kent, the most important producing area, was reported as 91.3 per cent of a standard condition compared with 84 in July. The report also stated that there had been a mitigation in disease attack. An earlier official report had said that the bine was fairly clean and reports of mould were few. The total hop area of England is officially reported at 25,550 acres compared with 26,260 acres in 1925 and 25,900 acres in 1924. The reduction in acreage is less than that agreed upon among members of the English Hop Growers' Ltd. whereby cropping plantations were to be limited to 90 per cent of the 1925 acreage. However trade reports state that in most cases the 10 per cent reduction would be arrived at by adopting the non-cropping system rather than by grubbing the hop plants. The imports of hops into the United Kingdom amounted to 36,000 pounds in July as compared with 635,000 pounds for July last year. The imports for the first seven months of the present year have amounted to only 2,856,000 pounds as compared with 7,637,000 pounds in 1925 and 8,666,000 in 1924. On the other hand the exports of British hops amounted to 3,150,000 pounds in July as compared with 500,000 pounds last year and the exports during the first seven months of the present year having totalled 5,056,000 pounds as compared with 2,434,000 pounds in 1925.

The 1926 hop crop in Belgium is forecast at 4,409,000 pounds as compared with 5,609,000 pounds harvested in 1925 according to the International Institute of Agriculture at Rome. While this figure indicates a crop below the two preceding years it is slightly above the average for the 5 years 1921-1925. Earlier reports from Belgium were pessimistic and a lower yield was expected.

No recent information is available on the condition of the present Canadian crop. A report published by the Canadian Pacific Railway states that new areas are being planted in British Columbia which will soon double the production of the Province and supply its domestic requirement.



Acreage in 1925 is unofficially reported as 640 acres. 300 acres are said to have been planted this year from which a harvest is expected this season. Additional areas are to be planted next year. The Canadian Pacific report states that in the last year for which statistics are available the brewing industry of the country used 2,036,000 pounds of hops.

A trade report from Germany gives the outlook for the new crop of lager beer hops as moderately favorable. The backward start resulting from poor weather in the spring has been recovered. Increases in acreage in the past three years should by now have a noticeable effect on the harvest, the report states. Hungarian hops were doing well about the middle of July. Condition was reported as between good and excellent.

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FOREIGN NEWS ON HOPSTHE HOPS OUTLOOK

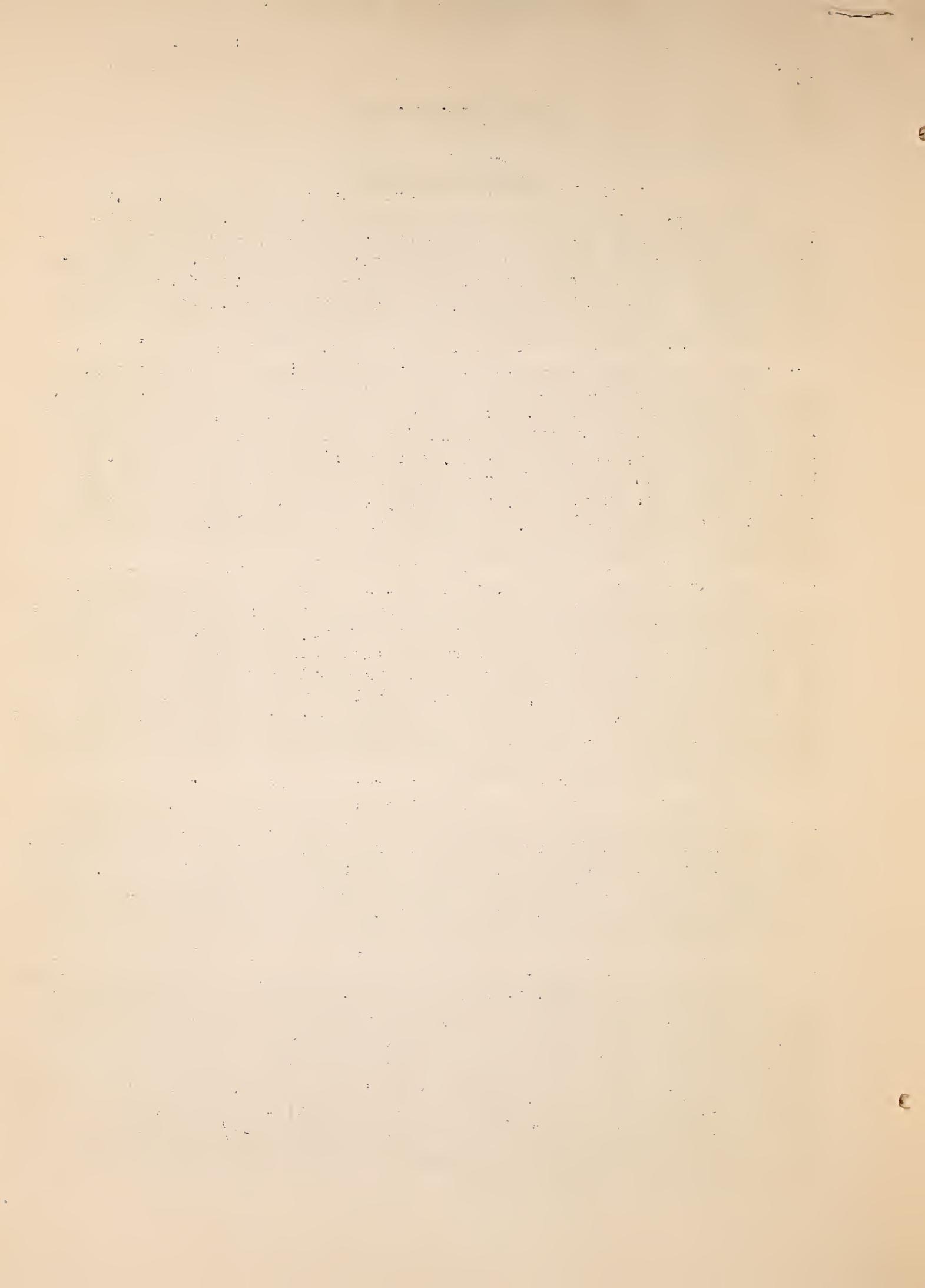
The 1926 world hops crop will probably range from 113,000,000 pounds to 121,000,000 pounds or somewhat below the 124,000,000 pounds produced in 1925, according to a report from L. V. Steere of the Department's Berlin office based on Czechoslovakian trade reports dated September 1, 1926. The world production as estimated by the firm of Coninck van Noyen, hop merchants at Alost, checks to the minimum figure.

The crop should about cover world requirements as a whole, but no surplus of any consequence will be left. There is some possibility, even, that a shortage of high quality hops may develop before another season, as Continental stocks of old crop hops are reported low, and the present requirements of high quality hops in Continental Europe are said to be fully as great as, or greater than, this year's production, even though no appreciable increase in beer consumption is anticipated. The price outlook for Continental hops, therefore, is for firm quotations with some possibility of a rise later, provided a shortage develops.

The Continental crop promises to be as large as, or possibly two to three per cent larger than, that of last year, but any increase will be due to greater production of lower grade hops in Poland. Czechoslovakia and Yugoslavia have larger crops than last year, also, but the yield in Germany has been greatly reduced by too much rain and disease, and will not be entirely made up by increases in Czechoslovakia and Yugoslavia. German production of hops, in fact, is being much affected by the disease "Peronospora humili". The German Brewers Association reports insignificant stocks of old crop hops in Germany.

In England, according to Mr. Steere's report the crop is thought to be from 15 to 25 per cent smaller than in 1925, but the large stocks on hand will largely offset this reduction. The Belgian crop, which competes with the American on British markets is reported about equal to last year's or slightly smaller. The British market outlook for American hops, as far as can be judged from these factors, is probably a little more favorable for the coming season than for the last one.

According to British official report of September 1 many hop gardens in the south-eastern counties of England suffered from severe attacks of mildew and red mould and as a consequence picking commenced in these places before the hops were fully ripe. In the west midland area some mould was beginning to appear in a few yards but the bine was reported to be generally healthy, and the burs were ripening well. The yield per acre in the South-eastern counties where the bulk of the crop is grown, is estimated at about 13 cwts (1,456 pounds) or 1-3/4 cwts (196 pounds) less than last year. In the west midlands the yield is estimated at nearly 9-1/2 cwts (1,064 pounds) or about the same as that of 1925.



The world hops production in 1926, as estimated by the Bohemian Hop Export Company, is as follows, production as estimated by the firm of Coninck van Noyen & Barth and Son are given for comparison, also official estimates for 1925:

HOPS: Estimates of world production 1925 and 1926

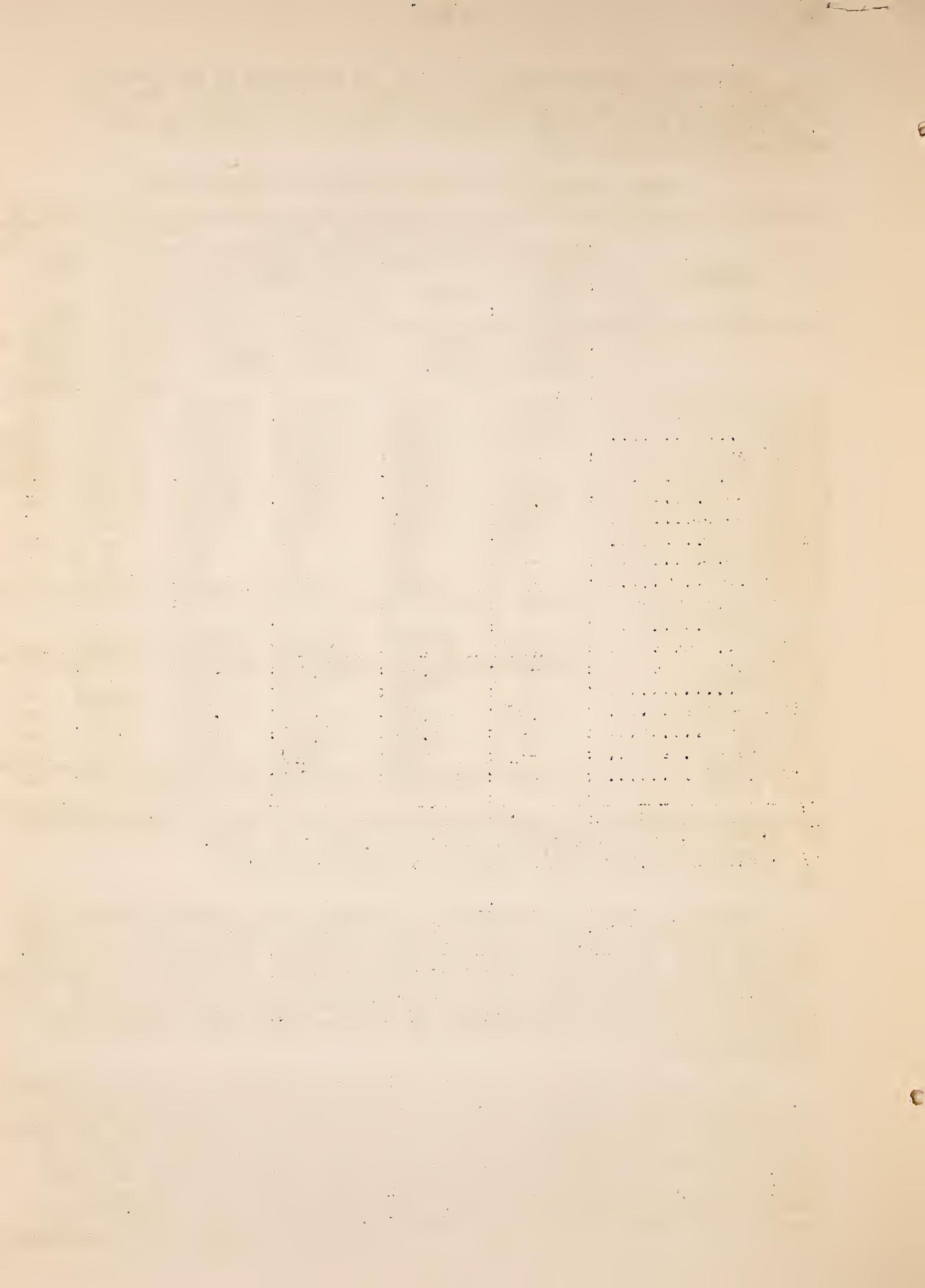
Country	As estimated by the		As esti-		As esti-	
	Official:	Bohemian Export Company	mated by	mated by	Coninck	Barth
	esti-	1926				
	mates	1925	Minimum	Maximum	van	&
	1925		:	:	Noyen	Son
	1,000	1,000	1,000	1,000	1926	1926
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>1,000</u>	<u>1,000</u>
					<u>pounds</u>	<u>pounds</u>
Czechoslovakia ....	15,466	15,466	18,730	19,841	17,086	20,944
Germany .....	10,646	14,330	8,267	8,818	11,023	a/
France .....	9,646	9,045	8,267	9,370	8,267	9,520
Yugoslavia .....	--	4,817	6,063	6,614	6,283	6,272
Poland .....	3,383	2,094	3,527	3,858	4,960	3,024
Belgium .....	5,609	4,470	4,189	4,409	3,968	--
Austria .....	107	107	110	110	--	--
Hungary.....	66	77	77	77	--	--
Rumania .....	--	30	33	33	--	--
Russia .....	--	1,653	1,654	1,654	1,102	--
Total Continental						
Europe .....	--	52,089	50,920	54,784	--	--
England .....	39,760	39,623	30,865	33,069	33,069	--
Total Europe .....	--	91,772	81,791	87,853	--	--
Canada .....	--	992	992	992	1,102	--
United States .....	28,573	29,101	28,100	30,313	23,920	--
Australia .....	--	1,653	1,653	1,654	1,654	--
New Zealand .....	--	551	551	551	--	--
World total .....	--	124,069	113,096	121,363	b/112,985	--

a/ Barth & Son do not report a definite figure for Germany but state that the crop will probably equal or exceed that of 1925.

b/ Includes 551,000 pounds produced in other countries.

Reviewing the hop situation, the Bohemian Hop Export Company states that the world hop acreage increased from 124,659 acres in 1924 to 136,050 acres in 1925, and that in Czechoslovakia, Germany, Yugoslavia and Poland, a further increase in sown area took place in 1926. In Bohemia the increase was 21.5 per cent (30,351 acres in 1926 against 24,987 acres in 1925). The increased acreage was a consequence of the favorable price situation the previous season.

The company also states that world beer production showed a continuous increase since the war, up to 1925, in spite of American prohibition, and that the hops requirements have risen accordingly. World beer production increased from 3,064,000,000 gallons in 1919 to 4,544,000,000 gallons in 1925, in the latter year requiring 122,576,000 pounds of hops, of which about 47,399,000 pounds were of the high quality grown in Continental Europe. Mr. Steere reports that other trade sources place 1926-27 world beer production at 4,750,000,000 gallons with high quality hops constituting



52,910,000 to 59,524,000 pounds of the total.

The hops situation now as compared with pre-war is shown by the following comparisons:

World hop acreage	1912	232,000 acres
	1925	136,000 "
World hop crop	1912	220,000,000 pounds
	1926	118,000,000 "
World beer production	1912	7,635,000,000 gallons
	1926	4,544,000,000 "
World hop requirement	1912	187,000,000 pounds
	1926-27	132,000,000 "

As to the outlook for the producers of hops, the opinion is frequently expressed by the Continental trade that countries producing high quality hops, and particularly Czechoslovakia, will find it profitable to increase their acreage in years to come, but that the United States, with the present quality of hops will find it increasingly difficult to sell hops on the Continent. This trade, of course, is now only very small.

The hop market in Czechoslovakia is very active according to a cable of September 28 from Agricultural Commissioner Haas at Berlin. During the period from the end of August to September 20 prices for good quality hops rose from \$80.60 to \$120.90 per 100 pounds, an increase of 50 per cent.

Czechoslovakia's hop crop for the current year according to a report from Commercial Attaché James F. Hodgson at Prague is estimated at 16,997,000 pounds. This figure which is considerably below other commercial estimates (see, page 2) indicates an increase of 10 per cent over last year's official figure of 15,466,000 pounds. The condition of the crop is reported as being good.

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UNITED STATES DEPARTMENT OF AGRICULTURE  
Bureau of Agricultural Economics  
Washington

F.S.  
H-11

December 6, 1926.

FOREIGN NEWS OF HOPS

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THE 1926 GERMAN HOP CROP

The 1926 German hop crop has been officially estimated at 5,562,000 pounds compared with 10,646,000 pounds in 1925, according to a report from Assistant Agricultural Commissioner L. V. Steere at Berlin. Most earlier trade reports have indicated that the German hop crop this year would be considerably larger than it turned out, many firms placing it only slightly below last year's production. The reduction in the German crop which finally became apparent is one of the chief factors in the strong market for continental hops this Fall.

The following table gives a summary of German hop production by districts:

German Hop Production

State	Area	Estimated		Average yield per acre	
		production:	1926	1925	1921-25
	Acres	Pounds	Pounds	Pounds	Pounds
Prussia .....	247.1	153,661	621.9	178.4	437.2
Bavaria.....	29,674.2	4,164,930	140.4	321.4	330.1
Wurtemberg .....	4,156.2	813,277	195.7	480.7	455.0
Baden .....	904.4	425,488	470.5	535.3	472.9
Others .....	29.7	4,850	163.3	348.0	-
Total 1926 .....	35,011.6	5,562,206	158.9	-	-
Total 1925 .....	30,820.8	10,645,793	345.4		
" 1924 .....	28,737.7	12,418,071	432.1		
" 1923 .....	38,690.8	7,011,289	244.4		
" 1922 .....	29,686.6	13,704,014	461.6		
" 1921 .....	27,870.4	7,097,489	254.7		
Total 1911-14 a/..	55,150.2	26,676,101	483.7		

Source: Statistisches Reichsamt.

a/ Figured on basis of existing boundaries (after deducting Alsace-Lorraine and Posen).

